

Age: 13 years		RHONDA L. (Mommer) SLATER, mother/guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Account period: 4/4/06 – 12/31/12	<ol style="list-style-type: none"> Accounting does not balance. Charges must equal Credits. The only asset of the guardianship is a 8.87% interest in real property. The real property was originally inventoried at \$51,989.00. The property on hand lists the value of the real property at \$32,376.00. The accounting should reflect the real property at its carry value not the market value. The carry value of the property does not change. Need Notice of Hearing. Need proof of service of the Notice of Hearing on Sarah Ashleigh Mommer (minor). Need Order. Local Rule 7.1.1F states a proposed order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office 10 days before the scheduled hearing, a continuance may be required.
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - ????	
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$51,989.00	
<input type="checkbox"/>	Inventory	Ending POH - \$32,376.00	
<input type="checkbox"/>	PTC	Guardian - waives	
<input type="checkbox"/>	Not.Cred.	Attorney - not requested.	
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Petitioner requests that:

- The Court make an Order approving, allowing, and settling the first account and report of guardian.

Reviewed by: KT**Reviewed on: 3/5/13****Updates:****Recommendation:****File 1 - Mommer**

Age: 17 years	PUBLIC GUARDIAN was appointed as Guardian of the Estate on 11/19/2009.	NEEDS/PROBLEMS/COMMENTS:
		If the Court agrees to the continuance this status hearing will be continued to Friday, December 13, 2013 at 9:00 a.m. in Dept. 303.
Cont. from	The Second Account was for the account period ending 12/23/11 was approved on 4/9/12 with a property on hand of \$34,970.73.	
Aff.Sub.Wit.		
Verified	This status hearing was set for the filing of the final accounting.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Status Report filed 1/30/13 states at the hearing on the second account, Attorney Kruthers mistakenly believed that the minor would turn 18 in 2012. She will actually not be 18 until October 2013. Because the next account period would not end until December 2013; and because the minor will turn 18 before that and be eligible to receive her money, the Public Guardian requests this status hearing be continued to a date in December 2013.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		Reviewed by: KT
UCCJEA		Reviewed on: 3/5/13
Citation		Updates:
FTB Notice		Recommendation:
		File 2 - Bratton

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory (Prob. C. 10400-10406, 10954, 11600-11642)

DOD: 07/23/10		MICHAEL TARASEVIC , Executor, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:	
				CONTINUED MULTIPLE TIMES	
		I & A - \$135,867.00		Minute Order from 11/09/12 states: Counsel informs the Court that they will be selling the house and liquidating. In addition, they will be paying the creditor.	
		POH - \$135,867.00		Minute Order from 10/05/12 states: Counsel informs Court that the waivers were filed today. She further advises that a letter was sent to the Franchise Tax Board in March.	
Cont. from 112811, 022712, 040912, 080712, 100512, 110912, 021113		Executor - waives		See Page 3B for Report of Sale and Petition for Order Confirming Sale of Real Property.	
Aff.Sub.Wit.		Distribution, pursuant to decedent's Will, is to:		As of 03/04/13, nothing further has been filed and the following issues remain:	
✓	Verified	Michael Tarasevic - \$58.50 cash, plus ½ interest in real property and ½ interest in a 1977 truck		1. The Petition states that all debts of the decedent have been paid, however, a Creditor's Claim in the amount of \$52,340.63 was filed by California Business Bureau for Community Medical Center on 11/02/10. The Petition states that no action has been taken on this claim at this time, therefore this debt has not been resolved. An Allowance or Rejection of Creditor's Claim was filed on 06/04/12 allowing the claim in the amount of \$24,689.09. Nothing further has been filed regarding this outstanding debt. <u>Distribution of estate assets cannot be made until all debts of the estate have been resolved.</u>	
✓	Inventory	Anthony Tarasevic - \$58.50 cash, plus ½ interest in real property and ½ interest in a 1977 truck			
✓	PTC				
✓	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters	11/30/10			
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	9202				
✓	Order				
	Aff. Posting			Reviewed by: JF	
	Status Rpt			Reviewed on: 03/04/13	
	UCCJEA			Updates:	
	Citation			Recommendation:	
✓	FTB Notice			File 3A - Tarasevic	

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 07/23/10		MICHAEL JAMES TARASEVIC , Executor, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:	
				<u>CONTINUED FROM 02/11/13</u>	
		Sale price - \$116,000.00		As of 03/04/13, nothing further has been filed and the following comments remain: 1. Petitioner calculation of the overbid amount appears to be incorrect. The Examiner calculates the correct overbid amount to be \$122,300.00. 2. The petition states that the property was reappraised for sale with a value of \$118,000.00; however, no Inventory & Appraisal (Reappraisal for Sale) has been filed confirming the reappraisal amount. Need Revised Inventory & Appraisal.	
		Overbid - \$122,750.00			
Cont. from 021113		Reappraisal - \$118,000.00			
<input type="checkbox"/>	Aff.Sub.Wit.	Property - 3522 W. Dayton Fresno, CA 93722			
<input checked="" type="checkbox"/>	Verified	Publication - The Business Journal			
<input type="checkbox"/>	Inventory	Buyers - Michael R. and Susan F. McClure			
<input type="checkbox"/>	PTC	Broker - \$6,960.00 (3% to Kent Oliver, Valley Partners and 3% to Ann M. Lee, Universal Lending & Realty)			
<input type="checkbox"/>	Not.Cred.				
<input checked="" type="checkbox"/>	Notice of Hrg				
<input checked="" type="checkbox"/>	Aff.Mail	w/			
<input checked="" type="checkbox"/>	Aff.Pub.			Reviewed by: JF Reviewed on: 03/04/13 Updates: Recommendation: File 3B - Tarasevic	
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.				
<input type="checkbox"/>	Conf. Screen				
<input type="checkbox"/>	Letters				
<input type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order				
<input checked="" type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				

Atty Bagdasarian, Gary G. (for Petitioner Ronald J. Bryant, Conservator)
 Atty Wright, Janet L. (Court-appointed for Conservatee)

**First Account Current and Report of Conservator; Petition for Allowance of
 Conservator and Attorney's Fees; and for Reimbursement of Costs to Attorney
 (Probate code 2620, 2623 & 2640)**

DOD: 1/31/2013		RONALD J. BRYANT , son and Conservator of the Person and Estate appointed 12/14/2011, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 021113		Account period: 12/14/2011 - 11/13/2012	<u>Continued from 2/11/2013.</u> Minute Order states the Court is informed that Ms. Bryant passed away on 1/31/2013. Matter continued to 3/11/2013.
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$55,812.73	
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$37,600.00	Note: Court will set status hearing as follows:
<input checked="" type="checkbox"/>	Inventory	Ending POH - \$51,617.35 (\$51,517.35 is cash)	
<input type="checkbox"/>	PTC		<ul style="list-style-type: none"> Friday, April 26, 2013 at 9:00 a.m. in Dept. 303 for filing of the final account and termination of proceedings for the deceased Conservatee.
<input type="checkbox"/>	Not.Cred.	Conservator - \$139.50 (per itemizations on Exhibits A, B, C, D, E; for 9.30 hours @ \$15/hour)	
<input checked="" type="checkbox"/>	Notice of Hrg		Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.	Attorney - \$17,125.00 (per Declaration filed 1/3/2013, itemized on Exhibits A, B, C, D, E; for 68.50 hours @ \$250/hour)	Reviewed by: LEG Reviewed on: 3/4/13 Updates: Recommendation: File 4 – Bryant
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Attorney Costs - \$1,385.00 (filing fees, publication for sale, process server)	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp	Petitioner states:	
<input type="checkbox"/>	Objections	<ul style="list-style-type: none"> Conservatee was a Defendant in an interpleader action (Case 10CECL12525) in which \$18,208.42 in undistributed surplus proceeds of a Trustee's sale were deposited with the Court, and following the Attorney's submission of a claim and attendance at hearing, the Court ordered after the judicial foreclosure that the surplus funds be distributed to the Conservatorship estate. Conservatee inherited a 1/4 interest in real property in Santa Maria, and following Order Confirming Sale of Real Property issued 9/25/2012, sale was consummated and proceeds of \$36,491.12 were deposited into the Conservatorship estate's blocked account. 	
<input checked="" type="checkbox"/>	2620		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
~Please see additional page~			

Petitioner requests the following amounts be paid from the blocked account:

1. **\$400.00** to Court Investigator's Department (*refer to Exhibit A*); and
2. **\$100.00** to George Montgomery for preparation of the accounting (*refer to Exhibit B*).

Note: Ex Parte Order for Withdrawal of Funds from Blocked Account filed 2/22/2013 authorizes **\$3,215.36** to be withdrawn from the Conservatorship account for payment to Santa Maria Cemetery for burial expenses.

Note: Notice to Director of Health Care Services under Probate Code §§ 215 and 9202 was filed 2/25/2013.

Atty Jaech, Jeffrey A. (for Ben H. Smith – Conservatee)

Atty Kruthers, Heather H. (for Public Guardian – Conservator of the Person and Estate)

Motion for Clarification of Order

Age: 85		BENJAMIN H. SMITH , Conservatee, is Petitioner. Petitioner states: 1. Under the Advanced Health Care Directive of Benjamin H. Smith ("Ben"), dated 06/17/11, Michael H. Smith, Jr. ("Butch") was designated as Ben's agent. Butch is Ben's grandson. 2. Butch had accepted his appointment as Ben's agent and had been so acting. 3. As a result of a petition for conservatorship of Ben's person and estate filed by Michael H. Smith, Sr. ("Mike") and Jenna R. Smith ("Jenna"), this court issued a minute order on 01/18/13 and a written order on 02/13/13. The order appoints the Fresno County Public Guardian as conservator of the person and estate of Ben. 4. Since 01/18/13, the Public Guardian and its legal counsel have insisted that the Public Guardian has exclusive authority to make health care decisions for Ben even though Ben named Butch as his agent under the Advanced Health Care Directive. Butch contends that as Ben's agent, he has priority under Probate Code § 4685 over any other person, including the conservator of Ben's person in making health care decisions for Ben. 5. Probate Code § 4685 provides as follows: Unless the power of attorney for health care provides otherwise, the agent designated in the power of attorney who is known to the health care provider to be reasonably available and willing to make health care decisions has priority over any other person in making health care decisions for the principal. Continued on Page 2	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: JF
Reviewed on: 03/05/13
Updates:
Recommendation:
File 5 - Smith

6. The Law Revision Commission Comments for the 1999 addition to Probate Code § 4685 provides in relevant part, "This section gives the agent the priority over others, including a conservator or statutory surrogate, to make health care decisions if the agent is known to the health care provider to be available and willing to act." The Comments also state that the rule of Section 4685 is subject to a contrary court order under Probate Code § 4766.
7. Probate Code § 4766(d) provides that a petition may be filed seeking an order declaring that the authority of an agent is terminated upon a determination by the court of both of the following:
 - (1) The agent...has violated, has failed to perform, or is unfit to perform, the duty under an advance health care directive to act consistent with the patient's desires or, where the patient's desires are unknown or unclear, is acting (by action or inaction) in the manner that is clearly contrary to the patient's best interest.
 - (2) At the time of the determination by the court, the patient lacks a capacity to execute or revoke an Advance Health Care Directive...Notice of the time and place of the hearing, together with a copy of the petition, must be served on the agent (Pr. C § 4769).
8. No § 4766 petition has been filed relating to Ben's advance health care directive, no notice of a request to terminate the agent's authority was given to Butch and the required findings were not made by the court.
9. Absent a court order under § 4766, the commentators mimic the rule stated in the Law Revision Commission Comments. "If a valid power of attorney for health care is in effect, unless the power or attorney provides otherwise, the agent under that power has priority over any other person in making health care decisions for the principal, including a conservator of the person, even if given medical consent powers." 1 *California Conservatorship Practice* (CEB 2012) Section 13.27.

The agent named in the power of attorney for health care (PAHC) has priority over all others, including the conservator, to act for the principal in all matters relating to health care decisions.... California legislatures have recognized that decisions about one's medical care are highly personal and should not be compromised. This policy decision is reflected in the high priority given to an agent for a PAHC by the Probate Court. *California Powers of Attorney and Health Care Directives* (CEB 2012) Section 2.29. "Unlike an agent under a [durable power of attorney], an agent under a PAHC has priority over the conservator of the person in making health care decisions when both the conservatorship exists and a PAHC has been executed." *Ibid.* at § 7.47.
10. The Public Guardian contends that its authority as conservator of the person trumps Butch's authority under the Advanced Health Care Directive, based on this court's order at the 01/18/13 hearing. However, at that time, there was no petition pending under Section 4766.
11. Attorney Jaech believes that Butch has been acting as Ben's agent in Ben's best interest. Because of his love and concern for, and experience with, his grandfather, Mr. Jaech believes he is better suited to make health care decisions for him than the Public Guardian.

Therefore, to resolve this conflict between the agent and the conservator of the person, it is requested that the court clarify its orders to state that the agent under the Advanced Health Care Directive has priority to make health care decisions, unless and until a successful petition is brought under Probate Code § 4766, and a court order to the contrary is issued.

Atty Macias, Alexandra (pro per – paternal aunt/Petitioner)

Atty Neumann, Dallas (for Kristina Knobloch – mother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 2

TEMPORARY EXPIRES 03/11/13ALEXANDRA MACIAS, paternal aunt, is
Petitioner.

Father: PHILLIP JIMENEZ

Mother: KRISTINA KNOBLOCH –
personally served on 11/30/12Paternal grandfather: NOT LISTED
Paternal grandmother: AMANDA
CULVER – served by mail on 11/29/12Maternal grandfather: NOT LISTED
Maternal grandmother: TERRI JOHNSON
– served by mail on 11/29/12**Petitioner alleges** that both parents
have substance abuse issues. The
mother is in recovery at this time, but
guardianship is needed to ensure
Gracie's safety and stability.**Court Investigator Samantha Henson
filed a report on 11/27/12.**

Continued on Page 2

NEEDS/PROBLEMS/COMMENTS:**CONTINUED FROM 12/05/12****Minute Order from 12/05/12 states: Matter
continued to 03/11/13. The temporary is
extended to 03/11/13. Counsel informs the
Court that mother is willing to test randomly
at the request of the guardian and will also
pay for the expenses of testing. The Court
orders testing as agreed upon by the
parties. The Court directs counsel to
prepare an order and include the visitation
that was agreed upon.****As of 03/05/13, the following items remain:**

1. Need proof of personal service at
least 15 days before the hearing of
Notice of Hearing with a copy of
the *Petition for Appointment of
Guardian or Consent & Waiver of
Notice or Declaration of Due
Diligence* for:
- Phillip Jimenez (father)
2. Need proof of service by mail at
least 15 days before the hearing of
Notice of Hearing with a copy of
the *Petition for Appointment of
Guardian or Consent & Waiver of
Notice or Declaration of Due
Diligence* for:
- Paternal grandfather
- Maternal grandfather

Reviewed by: JF**Reviewed on:** 03/05/13**Updates:****Recommendation:****File 6 - Jimenez**

Declaration of Mother, Kristina Knobloch, in Opposition to Petition for Appointment of Guardian filed 11/26/12 states: She has completed a six-month outpatient drug rehab program and continues to voluntarily participate in classes with the rehab program and attend AA/NA meetings. She is also attending a DUI program that was court ordered as a result of DUI's she received in 2006. She further states that she has a two bedroom apartment and the second bedroom is set up for Gracie. She states that she is a wonderful mother and that Gracie is very bonded to her. She states that she and the father are no longer in a romantic relationship, but they have maintained an amicable relationship for Gracie's sake. Also, she and the guardian are very civilized with each other and have been working together regarding visitation. She requests that the general guardianship be denied.

Petitioner's Response to Kristina Knobloch's Declaration in Opposition to Guardianship filed 12/04/12 states: she is very happy that Kristina appears to be clean & sober and doing well, however, she still has concerns due to her long history of treatment and subsequent relapse. Petitioner also is concerned that Kristina last drug tested on 06/11/12 and requests that the court order a more current drug test in order to ensure her sobriety.

Further, Petitioner states that Gracie has lived with her for the past 11 months and they are very bonded. Gracie calls Petitioner mom and to Gracie, the Petitioner is another mom. Petitioner states that she does not believe it is in Gracie's best interest to live with her mother full-time. Petitioner states that she has always had Gracie's best interest at heart. If the court decides not to grant the guardianship, Petitioner asks the court to consider a transition period so that Gracie has time to properly adjust to new living arrangements. Further, when the transition is complete, Petitioner requests that she have visitation 2 weekends per month. Lastly, Petitioner states that she feels that the most important word has been left out of the court documents and that is love. Petitioner states that she loves Gracie and Gracie loves her. Petitioner wants what is best for Gracie and she is extremely concerned about her long-term care. All Petitioner wants is for Gracie to be safe and loved.

Atty Sherwood, Peter A., of Sherwood Law Offices, Visalia (for Petitioner Linda Alexander Di Michillie, Successor Trustee)

Atty Dowling, Michael P., sole practitioner (for Respondent Cara Alexander Gimlin, Successor Trustee)

Pro Per Alexander, Kenneth A.; Alexander, Suzanne M. (Pro Per, son and daughter-in-law)

Petition for Order Confirming Ownership Interest in Real Property [Prob. C. 850, et seq.]

Carolyn DOD: 6/17/2002	<p>LINDA ALEXANDER DE MICHILLIE, daughter and Successor Trustee of the ALEXANDER DISCLAIMER TRUST, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> On 12/17/1998, ARTHUR M. ALEXANDER and CAROLYN K. ALEXANDER established the ALEXANDER FAMILY 1998 REVOCABLE TRUST (copy of Declaration of Trust attached as Exhibit A); Pursuant to the Trust terms, Arthur, as the surviving Settlor and Trustee, allocated assets of the ALEXANDER FAMILY 1998 REVOCABLE TRUST into a survivor's trust, that continued to be referred to as the ALEXANDER FAMILY 1998 REVOCABLE TRUST (hereafter SURVIVOR'S TRUST), and a disclaimer trust titled the ALEXANDER DISCLAIMER TRUST; On 4/11/2008, Arthur amended the SURVIVOR'S TRUST (copy of Amendment attached as Exhibit B); the Amendment appointed CARA ANN ALEXANDER GIMLIN, daughter, as temporary Co-Trustee of the DISCLAIMER TRUST; The DISCLAIMER TRUST became irrevocable upon the death of Carolyn on 6/17/2002; Arthur acted as Trustee of both the DISCLAIMER TRUST and the SURVIVOR'S TRUST until his death on 11/21/2011; Upon Arthur's death, pursuant to Trust terms CARA ANN ALEXANDER GIMLIN was appointed as the Successor Trustee of the SURVIVOR'S TRUST; Upon Arthur's death, pursuant to Trust terms LINDA ALEXANDER DE MICHILLIE [Petitioner] was appointed Successor Trustee of the DISCLAIMER TRUST; Pursuant to Trust terms, Cara Ann Alexander Gimlin's appointment as temporary Co-Trustee of the DISCLAIMER TRUST was terminated as a result of Arthur's death; (copy of Notice of Termination of Temporary Co-Trustee and Acceptance of Office of Successor Trustee of Trust attached as Exhibit C); <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note to Judge: Case in a nutshell: Proposed order appears to include a finding that a lien for repayment of loans from Trust assets in the total of \$360,815.70, plus interest continuing to accrue, shall be placed on the subject real property, and that this sum shall be paid to Petitioner as Successor Trustee of the Alexander Disclaimer Trust from proceeds of a Court-compelled sale of the real property that is requested by the Petitioner for satisfying the lien. Respondent Successor Trustee of the Survivor Trust asserts she has a <u>priority</u> claim for reimbursement of the loan funds plus rental income on the real property.</p>
Arthur DOD: 11/21/2011		
Cont. from		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail		W /
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		W /
Conf. Screen		
Letters		
Duties/S		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: LEG</p> <p>Reviewed on: 3/5/13</p> <p>Updates: 3/7/13</p> <p>Recommendation:</p> <p>File 7 - Alexander</p>

Petitioner states, continued:

- On 12/9/2002, Arthur disclaimed all right, title and interest in the assets allocated to the **DISCLAIMER TRUST** (copy of disclaimer attached as Exhibit D);
- Pursuant to the disclaimer, the assets allocated to the **DISCLAIMER TRUST** included "All stock and other securities (community property) of the Alexander Family Trust." Said stock and other securities included a Charles Schwab account and a UBS Financial Corp. account;
- On 11/9/2011, Arthur borrowed by margin loan **\$150,000.00** from the UBS Financial Corp account, and **\$190,327.95** from the Charles Schwab account, and said amounts were transferred to Stewart Title (copy of statements showing margin loans attached as Exhibit E);
- On 11/10/2011, Arthur and **KENNETH A. ALEXANDER**, son, and **SUZANNE M. ALEXANDER**, [daughter-in-law], purchased real property located on Mar Vista Drive in Monterey, California, for **\$375,000.00**, with escrow on the sale through Stewart Title, using the margin loan funds of **\$150,000.00** from the UBS and **\$190,327.95** from the Charles Schwab accounts toward the purchase of the property (copy of Buyer's Final Closing Statement attached as Exhibit F);
- A Grant Deed for the real property was recorded on 11/10/2011 in Monterey County Recorder's Office which vests title to: "Arthur M. Alexander, Trustee of the Alexander Family 1998 Revocable Trust UDT 12/17/1998 as to an undivided 50% interest and Kenneth A. Alexander and Suzanne M. Alexander, husband and wife as to an undivided 50% interest, all as tenants in common." (copy of Grant Deed attached as Exhibit G);
- Petitioner believes the remaining **\$37,500.00** was paid by Arthur, Trustee, and there is no mortgage lien or encumbrance against the real property; an appraisal of the real property located on Mar Vista Drive as of 5/21/2012 valued the real property at **\$480,000.00**;
- From the date of the margin loans on 11/9/2011 through 10/31/2012, the **DISCLAIMER TRUST** has paid interest to UBS Financial Corp. in the amount of **\$7,700.00** and to Charles Schwab in the amount of **\$12,787.75**; the **DISCLAIMER TRUST** will continue to pay interest on the margin loans until they are repaid;
- Petitioner believes that the real property on Mar Vista Drive is currently used as rental property, and that Kenneth A. Alexander has collected all rental proceeds in an amount in excess of **\$20,000.00** (copy of Residential Lease Agreement for real property located at 549 Mar Vista, Monterey naming Kenneth A. Alexander and Suzanne M. Alexander as landlords attached as Exhibit H);
- Kenneth has not used any of the income from the rental property to repay the margin loans used for the purchase of said real property;
- It is necessary to confirm the **DISCLAIMER TRUST's** interest in the real property since the ownership of the real property is claimed by the **SURVIVOR'S TRUST** [aka Alexander Family 1998 Revocable Trust] and Kenneth A. Alexander and Suzanne M. Alexander;
- **Petitioner requests** an order from this Court pursuant to Probate Code § 850(a)(2)(c) [and 850(a)(3)(B)] for confirmation of the Trust's ownership of the real property on Mar Vista Drive in Monterey, and requests that an equitable lien for the value of the margin loans, interest paid, as well as accruing interest, be placed against the real property, and in addition, that the real property be immediately sold and that said equitable lien be paid from the sale proceeds.

Petitioner prays for a Court order:

1. Confirming the **DISCLAIMER TRUST's** interest in the real property on Mar Vista Drive in Monterey, including but not limited to the amounts of the margin loans used for the purchase of the real property, and interest paid and accruing interest on margin loans; and
2. Directing the immediate sale of the real property on Mar Vista Drive in Monterey, and that the equitable lien to be placed by the Court be paid from the sale proceeds to the Petitioner, as Successor Trustee of the **DISCLAIMER TRUST**, prior to any other reimbursements that may be claimed for the real property.

~Please see additional page~

Cara A. Alexander Gimlin's Response to Petition for Order Confirming Ownership Interest in Real Property filed 3/6/2013 states:

- She (hereafter Respondent) is Successor Trustee of the **ALEXANDER FAMILY 1998 REVOCABLE TRUST**, as amended (hereafter **SURVIVOR'S TRUST**), and as beneficiary of the **SURVIVOR'S TRUST** and the **DISCLAIMER TRUST**;
- As Successor Trustee, Respondent holds title to an undivided 50% interest as a tenant-in-common in 549 Mar Vista Drive, Monterey, which is subject to a lease agreement that expires 3/10/2014;
- Respondent's co-[owners], **KENNETH ALEXANDER** and **SUZANNE ALEXANDER**, entered into the lease with the tenants and have been collecting rent of \$2,400.00 per month since March of [2012];
- Respondent is not a party to the lease and did not agree to rent to the current tenants;
- Respondent does not oppose the equitable lien being sought against the property by the Successor Trustee of the **ALEXANDER DISCLAIMER TRUST**, or sale of the property;
- Respondent does, however, believe the **SURVIVOR'S TRUST** is entitled to the rents that have been collected by **KENNETH ALEXANDER** and **SUZANNE ALEXANDER**, as Respondent has advanced costs towards maintenance and upkeep of the property, including insurance premiums and debt service of **\$8,400.00** on the margin loans used to finance the purchase of the property, and must continue to pay down the margin loan debt;
- Respondent alleges that based upon the above-referenced circumstances, **the SURVIVOR'S TRUST's claim to the rental money is superior to that of any other party to these proceedings** [emphasis added] and should be reimburse to Respondent and/or disgorged prior to any other reimbursements that may be claimed.

**Resignation and Declination of Successor Trustees to Serve, Nominations of
Successor Trustee and Petition for Appointment of Successor Trustee [Prob. C.
17200(b)]**

		ART PEARSON , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states the Trustor and original trustee Antonia C. Orosco died on 11-23-11. The sole asset of the trust is the Trustor's residence at 4529 E. Inyo in Fresno County.	
	Aff.Sub.Wit.		
✓	Verified	The named successor trustee Anastacio C. Navarro declined to serve, and the alternate named successor trustee Isabel Navarro has served from the date of the trustee's death until she executed a resignation on 8-7-12.	
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	There is now a vacancy in the office of trusteeship. The trust provides that in the event of vacancy, trustee shall be appointed by a majority of adult beneficiaries.	
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	The first amendment provides that upon the Trustor's death, the trust is to terminate and assets distribute 1/3 to Art Pearson and Mary Pearson, or the survivor (Art Pearson is the survivor), 1/3 to Anastacio C. Navarro and Isabel Navarro, and 1/3 to John Navarro.	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt	All beneficiaries nominate Petitioner as successor trustee and waive bond. Petitioner consents to serve as successor trustee.	
	CI Report		
	9202		
✓	Order	Petitioner prays for orders that:	
	Aff. Posting	1. The Court accept the declination of Anastacio C. Navarro and the resignation of Isabel Navarro as Successor Trustee;	
	Status Rpt	2. The Court appoint Art Person as Successor Trustee without bond; and	
	UCCJEA	3. Such further orders as the Court considers proper.	
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 3-5-13
			Updates:
			Recommendation:
			File 8 - Orosco

DOB: 10/25/2012		ANTHONY P. COELHO III, KRISTEN M. SUSOEV and LESLIE C. WALTERS, children/named co-executors without bond, are petitioners. Full IAEA – o.k. Will dated: 11/16/1999 Residence: Fresno Publication: The Business Journal <u>Estimated value of the Estate:</u> Real Property - \$560,000.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: <u>Note: If the petition is granted status hearings will be set as follows:</u> • Friday, 08/09/2013 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 05/09/2014 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from			
Aff.Sub.Wit.	s/p		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail			
✓ Aff.Pub.	w/		
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: LV
Reviewed on: 03/05/2013
Updates:
Recommendation: Submitted
File 9 - Coehlo

10 **Noah Vang, Christian Vang, and Jacob Vang (GUARD/P) Case No. 06CEPR00894**
Atty **Vang, Yee (Pro Per – Father – Petitioner)**
Atty **Carrasco, Chue Vang and Octavio (Pro Per – Paternal Aunt and Uncle – Guardians of Noah)**
Atty **Boyajian, Thomas M. (for Cynthia and Terry Moua – Maternal Grandparents – Guardians of Christian and Jacob)**

Ex Parte Petition for Visitation

Noah, age 8		YEE VANG , Father, is Petitioner. CHUE VANG CARRASCO and OCTAVIO CARRASCO , Paternal Aunt and Uncle, were appointed Guardians of Noah (8) on 1-30-12. CYNTHIA and TERRY MOUA , Maternal Grandparents, were appointed Guardians of Christian (3) and Jacob (2) on 7-12-12. Petitioner states he was released from jail because of overcrowding and he does not know how long he will be out. He would like to visit with his children and maintain a relationship with them. His family has court ordered visits on the 2 nd and 4 th weekend of the month and he would love to see his children during those times. Petitioner submitted a proposed Order that provides that Yee Vang be allowed to visit with the three children every 2 nd and 4 th weekend while under the supervision of the paternal family. Noah (8) has expressed that he misses his father and wants him and his brothers to be able to visit with him. As guardians, we support Noah's wishes and will allow him safe and productive visitations. We understand that guardianship is temporary and reunification is the ultimate goal. Therefore, it is important that the children maintain a relationship with their father. We also support any positive effort Yee Vang may take to rebuild his relationship with his children.	NEEDS/PROBLEMS/COMMENTS: Note: As described in Father's petition, the most recent visitation order made on 7-12-12 provides that Christian and Jacob, who reside with maternal grandparents Cynthia and Terry Moua, shall visit with the Carrascos (paternal aunt and uncle and guardians of Noah) on the 2 nd and 4 th weekends. Note: Although a proposed order was provided, the Court may wish to use minute order only for visitation.
Christian, age 3			
Jacob, age 2			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 3-5-13
Updates:
Recommendation:
File 10 - Vang

Ex Parte Motion for Modification OF Child Visitation

Elijah age: 8		REBECCA ELIZONDO , maternal aunt, ABRAHAM ELIZONDO , maternal grandfather and, LISA ELIZONDO , maternal grandmother, are petitioners. Petitioners were appointed guardians on 9/7/2011. Father: MICHAEL JAY VASQUEZ Mother: ELIZABETH VASQUEZ ; <i>personally</i> served on 1/8/2013. Petitioners state the motion is brought on the grounds that Michael Vasquez and Elizabeth Vasquez are a danger and threat to the children. The Family Court has granted permanent restraining orders protecting the children from their respective parents, however the Family Court deferred the issue of the parents having visitation with the children to the Probate Court. Petitioners allege that since the establishment of the guardianship both parents have habitually made false claims of abuse against the guardians to both the Fresno Police Department and Child Protective Services. The parents both use their time at CYS to interrogate the children. Then they proceed to call the Fresno Police Department and Child Protective Services to make false allegations. The police have come to the Guardians' home to question the children. The children have told police officers again and again that they are not being harmed. Both children are very frightened and cry after being interrogated by the police and social workers.	NEEDS/PROBLEMS/COMMENTS: Page 1B is the <i>Ex Parte Petition</i> for Visitation filed by Elizabeth Vasquez, mother. Page 1C is the <i>Court Trial Re:</i> Visitation. <u>Continued from 1/16/2013.</u> The following issue remains: 1. Need proof of personal service of the Notice of Hearing along with the moving papers on: a. Michael Vasquez (father) . Note: The Notice of Hearing personally served to Michael Vasquez on 1/16/2013 lists a hearing date of 1/28/2013; Court records do not show personal service to him for the 1/16/2013 hearing, although he was present in Court on that date. The hearing on 1/28/2013 was for the Petition for Visitation filed by Rebecca Elizondo, at which no appearances were made and the Court denied the petition.
Elaina age: 6			
Cont. from 011613			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv. W/		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Please see additional page

Petitioners allege, continued:

Both children have received extended therapy sessions with their individual licensed mental health clinicians due to all the continued false allegations and lies by the parents. Both children are in counseling and Petitioners have spoken to each child's counselor and they have informed Petitioners that the children continue to need intense and extended therapy which Petitioners believe is a direct result of their parents' continued actions.

Petitioners request the court grant a temporary order of no contact between the children and Elizabeth Vasquez and Michael Vasquez pending a full hearing on the issue.

Declaration of Elizabeth Vasquez (mother) filed on 1/14/13. Mother states she is objecting to the modification of the visitation. Visitation with the children is conducted at CYS for two hours. Visitation has strict guidelines with rules and regulations. Before visits were started both parties had to attend orientation and sign and initial all the rules and regulations which must be followed for visits to occur. She has concerns about the well-being of the children. On the visit on Wednesday, July 11, 2012, Elijah kept complaining about a headache that he got from being out in the sun all day. There was a heat advisory that day and the temperature was 105. After the visit mom states she was concerned and sent a text to her mother, Lisa Elizondo, simply asking if Elijah was okay, and if he was getting plenty of water to keep hydrated since he had a headache. Lisa Elizondo's response was LEAVE ME ALONE. On the Wednesday, 8/26/12 visit Elijah had a black eye and scratches all over his face. It looked as if he had been punched. CYS documented this. Mom states she was truly concerned about her son because the Elizondo's 18 year old son, Andrew was living with them and had been constantly bullying Elijah. Elijah stated on one occasion, "Uncle Andrew throws chips on the floor and makes me eat them like a dog." Mom alleges the Elizondo's refuse to have any kind of contact with her about her children. She has not contacted them in the past to bother them, she just simply wanted to know about her children. Mom states she has been making positive changes in her life since the guardianship was granted. She is trying with all her heart to regain custody of her children. Mom states she truly believes that the guardians will do anything in their power to try to destroy any kind of relationship and bond that she has with her children.

Declaration of Michael Vasquez (father) filed on 1/15/13. Father states the visits with his children are held at a supervised agency where the visits are monitored and documented. Since the visits have been supervised father state he has only had great visits. They watch movies, play board games, read books together and have really started to bond again since the guardianship was granted. Father alleges that the guardians are not abiding by the court's order for visitation. The last time he was able to speak to his children was on 11/4/12. The last time he was able to speak to the children was on 11/12/12. Father states on 11/15/12 he called to speak to the kids for his scheduled telephone visit, there was no answer. Father states he called three more times, again no answer. On 11/18/12 Father states he went to CYS for his scheduled visit he saw Rebecca Elizondo waiting outside. When he walked to the door a man approached and served him with paperwork for a Temporary Restraining Order. This is in violation of CYS' rules and procedures that state there will be no serving of court documents on CYS property. On 12/5/12 Father states he attended the Restraining Order hearing where the Elizondo's asked the Family Court Judge to take away his visitation. The Restraining Order was granted but since there was a probate case open the child visitation was to remain. Father states he contacted CYS on 12/19/12 and showed them that he should still be having visits. CYS stated they had filled his visitation day and that they had to contact the Elizondo's to schedule a different date for the visits. Father states he has been in contact with CYS for 4 weeks and that the Elizondo's have not been in contact with CYS. The guardians refuse to have any contact with CYS or to allow him to visit. Father is requesting to have all his back visits that he has missed since 11/4/12.

Please see additional page

Current Visitation Order as of 1/25/2012:

The parents have supervised visits at Comprehensive Youth Services (CYS) 2 hours each week per parent with days and times to be arranged by the supervising agency.

Phone calls each Monday and Thursday each week.

On Monday Mom can call between 6:30 and 7:00 p.m. and Dad can call between 7:00 and 7:30 p.m.

On Thursday Mom can call between 4:30 and 5:00 p.m. and Dad can call between 5:00 and 5:30 p.m.

The duration of the call is to be determined by the child's attention span (approximately 5 minutes per child, one child at a time).

Ex Parte Petition for Visitation

Elijah age: 8	ELIZABETH VASQUEZ , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Elaina age: 6	REBECCA ELIZONDO , maternal aunt, ABRAHAM ELIZONDO , maternal grandfather and, LISA ELIZONDO , maternal grandmother, were appointed guardians on 9/7/2011.	
Cont. from 011613		<u>Continued from 1/16/2013.</u> See Page 1C for notes regarding contents of <i>Minute Order</i> .
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Father: MICHAEL JAY VASQUEZ	The following issues remain:
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Petitioner states the guardians are not fulfilling their duties and caretakers. They are not following the court's orders which grant her telephone visitation on Mondays and Thursdays and visitation two hours per week at CYS.	1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing along with a copy of the Petition on: a. Rebecca Elizondo (Co-Guardian) b. Abraham Elizondo (Co-Guardian) c. Lisa Elizondo (Co-Guardian) d. Michael Jay Vasquez, father.
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	X	
<input type="checkbox"/> Aff.Mail	X	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	The guardians did not bring the children for their visit at on Sunday, January 6, 2013. Petitioner states CYS called her on 1/6/13 stating that the Guardians are not returning their calls and cancelled visitation because of the hearing. The Guardians also owe several outstanding balances to CYS.	
<input type="checkbox"/> Video Receipt	On Monday, November 12, 2012 Petitioner states she called the Guardian's residence to speak to the children. Petitioner state she spoke to Elijah for 6 minutes and the Guardians hung up and would not let her speak to Elaina.	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		Reviewed by: KT / LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 3/6/13
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice	On Monday, 12/24/12 at 6:31 and 6:35 Petitioner states she called the Guardian's residence to have her visit but there was no answer, the call went to voicemail. On Monday, 1/7/13 at 6:31 Petitioner states she called for her telephone visit there was no answer. Petitioner states she called a second time and someone intentionally hung up the phone. Petitioner states if the court did not suspend visitation then the Guardians are not following the court's order which grants her visitation.	File 1B - Vasquez

Atty Hopper, Cindy J., sole practitioner (for Co-Guardians Rebecca Elizondo, Abraham Elizondo and Lisa Elizondo)

Pro Per Vasquez, Elizabeth (Pro Per mother)

Pro Per Vasquez, Michael Jay (Pro Per father)

Court Trial Re: Visitation

Elijah age: 8	<p>REBECCA ELIZONDO, maternal aunt, ABRAHAM ELIZONDO, maternal grandfather, and LISA ELIZONDO, maternal grandmother, were appointed Co-Guardians on 9/7/2011. <i>Minute Order</i> dated 9/7/2011 made directives for the parties relating to one another and specified visitation orders.</p> <p><i>Petition for Termination of Guardianship</i> was filed <u>11/18/2011</u> by ELIZABETH VASQUEZ, mother, set for hearing on 1/25/2012; <i>Minute Order</i> dated 1/25/2012 denied the petition and orders visitation to remain as previously ordered with specified modifications.</p> <p><i>Ex Parte Petition to Modify Visitation</i> was filed <u>1/3/2012</u> by REBECCA ELIZONDO, Co-Guardian, and <i>Ex Parte Petition for Visitation</i> was filed <u>1/6/2012</u> by ELIZABETH VASQUEZ, mother; both were set for hearing on 1/17/2012; <i>Minute Order</i> dated 1/17/2012 provides detailed visitation orders.</p> <p><i>Petition for Visitation</i> was filed <u>12/3/2012</u> by REBECCA ELIZONDO, Co-Guardian, set for hearing on 1/28/2013; <i>Minute Order</i> dated 1/28/2013 states no appearances were made, and Court denied petition.</p> <p><i>Ex Parte Motion for Modification of Child Visitation</i> was filed <u>1/4/2013</u> by REBECCA ELIZONDO, ABRAHAM ELIZONDO and LISA ELIZONDO, Co-Guardians, and <i>Ex Parte Petition for Visitation</i> was filed <u>1/9/2013</u> by ELIZABETH VASQUEZ, mother; both were set for hearing on 1/16/2013; <i>Minute Order</i> dated 1/16/2013 states:</p> <ul style="list-style-type: none"> Also present in the courtroom is MICHAEL VASQUEZ, father; Matter set for Court Trial on 3/11/2013; The Court directs the court investigator to conduct a complete investigation of the parties and also speak with the two therapists; parties enter into a waiver of confidentiality so the court investigator can speak with the therapists; Counsel is directed to provide the Court documents regarding the following: efforts made to serve mother and father; case numbers to the pending Family Law matters; as well as any documents addressing the issue of visitation with respect to the benefit or detriment to the children; The Court orders that there be no visitation or telephone calls between mother, father, and the children in the interim pending the next hearing. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Visitation Order as of 1/25/2012:</p> <p>The parents have supervised visits at Comprehensive Youth Services (CYS) 2 hours each week per parent with days and times to be arranged by the supervising agency. Phone calls each Monday and Thursday each week. On Monday mother can call between 6:30 and 7:00 p.m., and father can call between 7:00 and 7:30 p.m. On Thursday mother can call between 4:30 and 5:00 p.m., and father can call between 5:00 and 5:30 p.m. The duration of the call is to be determined by the child's attention span (~5 minutes per child, one child at a time).</p>
Elaina age: 6		
Cont. from		
Aff.Sub		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/S		
Objectn		
Vid Rcpt		
CI Report		
9202		
Order		
Aff. Post		
Status Rpt		
UCCJEA		
Citation		
FTB Notc		

Reviewed by: LEG**Reviewed on:**
3/6/13**Updates:****Recommendation****File 1C – Vasquez**

Atty Gregory, Jacqueline (Pro Per – Guardian – Maternal Grandmother)

Atty Lerae Ayalla, Natasha Chatiem (Pro Per – Petitioner – Mother)

Petition for Termination of Guardianship

Age: 8		NATASHA AYALLA, mother is petitioner.		NEEDS/PROBLEMS/ COMMENTS: Page 11B is the Order to Show Cause set by the Court pursuant to the minute order from 02/25/2013. The following issues still remain: 1. Need proof of service fifteen (15) days prior to the hearing of the Petition for Termination of Guardianship or declaration of due diligence for: <ul style="list-style-type: none"> • Jacqueline Gregory (Guardian) • Tanielu A. Devine (Father) • Paternal Grandfather (Unknown) • Deana Devine (Paternal Grandmother) • Maternal Grandfather (Not Listed) 2. Notice of Hearing is incomplete at #1, it does not provide the petitioner's name nor what type of petition was filed.
		JACQUELINE GREGORY, maternal grandmother, was appointed guardian on 11/03/2011. Guardian was personally served.		
		Father: Tanielu A. Devine,		
		Paternal grandfather: Unknown		
		Paternal grandmother: Deana Devine		
		Maternal grandfather: Not Listed		
Cont. from 012813, 022513		Petitioner states: the child has been residing with the petitioner/mother since March 2012, he is on her lease, she provides for his clothing and necessities as well as participates in all school related events. She states that the guardian does not take care of the child what so ever.		
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail	x		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	w/		
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: LV Reviewed on: 02/20/2013 Updates: 02/22/2013 Recommendation: File 11A – Devine

Atty Lerae Ayalla, Natasha Chatiem (Pro Per – Mother)

Order to Show Cause Re: Failure to Appear

Age: 8	JACQUELINE GREGORY , maternal grandmother/guardian. (See page 11A)	Minute Order of 02/25/2013 Mother, Natasha Ayala, informs the Court that the child is with the guardian, Jacqueline Gregory. The Court notes for the minute order that Jacqueline Gregory is not present in Court. The Court sets the matter for an Order to Show Cause regarding failure to appear on 03/11/2013. The Court orders Jacqueline Gregory to be personally present with Tanilue Devine on 03/11/2013. The Court further orders Jacqueline Gregory to provide the Court proof of Tanilue Devine's enrollment in school, record of academic standing, and address to where the child is residing. The Court orders mother, Natasha Ayala, to submit to a drug test today and provide the results of that test and the previous one to the Court.	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: LV
			Reviewed on: 03/05/2013
			Updates:
			Recommendation:
			File 11B - Devine

Atty Gonzales, Monique Marie (pro per Guardian/paternal aunt)

Atty Gonzales, Angel III (pro per Petitioner/father)

Petition for Termination of Guardianship

Age: 3 years		ANGEL GONZALES, III , father, is petitioner. MONIQUE GONZALES , paternal aunt, was appointed guardian on 1/30/2012 – consents and waives notice. Mother: MIRANDA HIJAREDA – served by mail on 1/7/13 Paternal grandfather: deceased Paternal grandmother: Jeanetta Ball – served by mail on 1/7/13 Maternal grandfather: deceased Maternal grandmother: Lisa Valdez – served by mail on 1/7/13	NEEDS/PROBLEMS/COMMENTS: This petition is as to ANGELINA GONZALES only. Continued from 1/28/13. Minute Order states Court advises both parties to give new addresses and phone numbers to the clerk's office. 1. Petition is incomplete. a. It does not state why terminating the guardianship is in the best interest of the minor (#5 of the petition) b. Does not list the names and current addresses of the relatives of the minor (#9 of the petition).
Cont. from 012813			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg	Petitioner states ??? Court Investigator Julie Negrete's Report filed 2/28/13	
✓	Aff.Mail		W/
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 3/5/13
			Updates:
			Recommendation:
			File 12 - Gonzales

DOD: 1-15-09		JOE HOGG , Son, is Petitioner and requests appointment as Administrator and as Special Administrator with Full IAEA and with bond of \$130,000.00. Full IAEA – need publication Decedent died intestate Residence: Fresno Publication: need publication Estimated value of estate: Personal property: \$130,000.00 Probate referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 4-11-13</u> Per petitioner request 1. Need clarification: Petitioner includes a request for Special Administration, but with general powers, and does not clarify the purpose of the proposed special administration. 2. Petitioner does not state the relationships of the persons listed at #8 to the decedent. 3. Need date of death of the decedent's deceased spouse (Local Rule 7.1.1.D). 4. Need Confidential Supplement to Duties (DE-147S). 5. Need Notice of Petition to Administer Estate (DE-121). 6. Need proof of service of Notice of Petition to Administer Estate on relatives listed in #8 at least 15 days prior to the hearing per Probate Code §8110. 7. Need publication per Probate Code §8120. The publication should include the powers requested (such as IAEA language).
Cont. from 020413			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.	X	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	X	
<input checked="" type="checkbox"/>	Duties/Supp	X	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 3-5-13
Updates:
Recommendation:
File 13 - Crenshaw

Atty Mendoza, Jovita (Pro Per – Petitioner – Maternal Grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Cesar, 9	TEMPORARY EXPIRES 03/11/13		NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice for: <ul style="list-style-type: none"> Paternal Grandparents (Unknown) – Unless the Court dispenses with notice. Note: Declaration of Due Diligence filed 01/31/2013 states that the petitioner has never met the paternal grandparents nor does she know their names and therefore she is unable to locate someone whose name is unknown to her.
Joshua, 6			
Brian, 5			
Luis, 2			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

JOVITA MENDOZA, maternal grandmother, is Petitioner.

Father: **CESAR GUZMAN AYALA** – Court dispensed with further notice pursuant to Minute Order dated 01/22/2013.

Mother: **ELIZABETH MENDOZA** – Consent & Waiver of Notice filed 01/07/13

Paternal grandparents: UNKNOWN, Declaration of Due Diligence filed 01/31/2013

Maternal grandfather: LUIS MENDOZA, served by mail on 01/30/2013

Petitioner alleges that the children's father has been deported to Mexico due to domestic violence and the mother is in rehab. Petitioner states that temporary guardianship is necessary because Joshua's social security benefits have been stopped and won't resume until she is appointed guardian of him. Petitioner states that Joshua is in school and his social security income is needed to pay for his clothing and necessities. Further, Petitioner states that temporary guardianship is needed so that she can attend to the children's medical and school needs.

Court Investigator Jennifer Daniel's report filed 02/27/2013.

Reviewed by: LV
Reviewed on: 03/05/2013
Updates:
Recommendation:
File 14 - Guzman

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 5		TEMPORARY EXPIRES 03/11/13		NEEDS/PROBLEMS/COMMENTS:	
		NOEMI HERNANDEZ , maternal grandmother, is Petitioner.		1. Need Notice of Hearing.	
		Father: NOT LISTED (Matthew E. Ramirez)		2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:	
Cont. from		Mother: ANGELICA BARBOZA – Consent & Waiver of Notice filed 01/08/13		<ul style="list-style-type: none"> Matthew E. Ramirez (Not Listed) 	
	Aff.Sub.Wit.			Note: A declaration of due diligence was filed on 01/08/2013 on Matthew Esequiel Ramirez however it is unclear to the Examiner as to who this individual is. There is no information regarding how this individual is related to the minor, nor does the declaration provide any information regarding the petitioner's efforts to search for this individual.	
✓	Verified	Paternal grandparents: NOT LISTED		3. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:	
	Inventory	Maternal grandfather: JOSE HERNANDEZ		<ul style="list-style-type: none"> Paternal Grandparents (Not Listed) Jose Hernandez (Maternal Grandfather) 	
	PTC	Petitioner alleges that the mother suffers from mental health problems and is not taking her medication. Petitioner states that temporary guardianship is necessary to ensure that her grandson is well taken care of.		4. UCCJEA does not provide the child's residence for the past five years as required.	
	Not.Cred.	Court Investigator Dina Calvillo's report filed 03/05/2013.			
	Notice of Hrg				
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: LV	
				Reviewed on: 03/06/2013	
				Updates: 03/07/2013	
				Recommendation:	
				File 15 - Ramirez	

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 19		TEMPORARY DISMISSED 2-1-13 per request by Petitioner DONNA MCDOWELL , Adoptive Mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers. Voting rights affected A Capacity Declaration was filed 1-31-13. Petitioner states Keyanna is severely disabled. She is unable to walk or talk. She has been under Petitioner's care as her mother since she was an infant. Court Investigator Jennifer Young filed a report on 3-4-13.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 2-25-13 Voting rights affected - Need minute order 1. The Court may require clarification regarding whether the siblings listed at #11 of the petition require notice pursuant to Probate Code §1822. (If the siblings listed are from the birth mother, notice is not required, as that relationship has been terminated.)	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc
Reviewed on: 3-5-13
Updates:
Recommendation:
File 16 - McDowell

Pro Per Riddlesprigger, Paulette Royetta (Pro Per Petitioner)

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 2/6/2010	PAULETTE ROYETTA RIDDLESPRIGGER , surviving spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	No other proceedings.	
Cont. from		1. <i>Proof of Service by Mail</i> of the <i>Notice of Hearing</i> filed 3/4/2013 shows notice was mailed on 3/1/2013, giving only 10 days' notice of hearing rather than 15 days as required by Probate Code §§ 13655 and 1220.
<input type="checkbox"/> Aff.Sub.W	Testate OR intestate?	
<input checked="" type="checkbox"/> Verified		2. Item 9 of the <i>Petition</i> does not indicate the relationships to Decedent of the persons listed, as follows: <ul style="list-style-type: none"> • Gary Riddlesprigger; • Lynn Riddlesprigger (<i>Note: Notice lists Lynn Locke, who may be the same person, but not indicated</i>); • Dawn Riddlesprigger; • Maisha Riddlesprigger.
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Petitioner states no facts upon which she bases the allegation that the property should be determined as passing to her.	3. Item 4(c) of the <i>Petition</i> is incomplete re: whether Decedent died intestate or testate, and if testate, a copy of Decedent's Will must be attached to the <i>Petition</i> .
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		4. Need <i>Attachment 7</i> to the <i>Petition</i> describing facts upon which the Petitioner bases the allegation that the property should be determined as passing to the Petitioner as the surviving spouse of Decedent.
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Petitioner requests Court determination that a ½ interest in real property located at 644 Fresno Street, Fresno , passes to her.	5. Need <i>Attachment 5a</i> to the proposed order describing the real property passing to the Petitioner.
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		Note: <i>Petition</i> does not contain <i>Attachment 7(a)</i> containing the legal description of the real property; however, an <i>Affidavit – Death of Joint Tenant</i> dated 8/31/2012 is attached which contains the legal description, and has been reviewed as part of this <i>Petition</i> in lieu of a separate <i>Attachment 7(a)</i> .
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		Reviewed by: LEG
<input type="checkbox"/> Duties/S		
<input type="checkbox"/> Objectn		Reviewed on: 3/5/13
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		Updates:
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		Recommendation:
<input type="checkbox"/> Aff. Post		
<input type="checkbox"/> Status Rpt		File 17 - Riddlesprigger
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notic		

DOD: 7-23-12		DAVID RONALD SPENCER and SUZANNE SPENCER MACINNIS , Co-Executors, are Petitioners. Accounting is waived. I&A: \$212,000.00 POH: \$195,088.40 (cash) Executors (Statutory): Waived Attorney (Statutory): \$7,240.00 Distribution pursuant to Decedent's will: David Ronald Spencer: \$93,924.20 Suzanne Spencer MacInnis: \$93,924.20	NEEDS/PROBLEMS/COMMENTS:
<input checked="" type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 9-12-12		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 3-5-13 Updates: Recommendation: SUBMITTED File 18 - Spencer	